STATE OF TENNESSEE
DEPARTMENT OF GENERAL SERVICES

STEVEN G. CATES
COMMISSIONER

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GOVERNOR

Requisitions

Creating New Requisitions

Agency Level- Requester

Introduction: Requisitions are created by Agency Requesters in Edison using the eProcurement section. They are used as the starting point for requesting purchases from both internal Agency Buyers and Central Procurement Office Personnel.

- **Agency Buyers:** Requisitions for purchases from $5,000-$25,000 and Contract Release requests are both routed to Agency Buyers. Agency Buyers eventually create Purchase Orders from these requests. They can also create POs for purchases under $5,000.

- **Central Procurement Office Personnel:** Requisitions for Agency Term Contracts and One-time Purchases over $25,000 are both routed to the Central Procurement Office (CPO). These are bid out to Vendors and eventually become either a Purchase Order or Agency Contract.

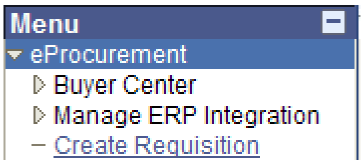
Process: ***How to Create a Requisition***

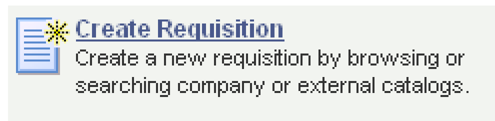
Step 1: Define Requisition

1) To create a Requisition, you must first be logged in to Edison. After logging in, click the FSCM link under the Enterprise menu, on the left side of the page.

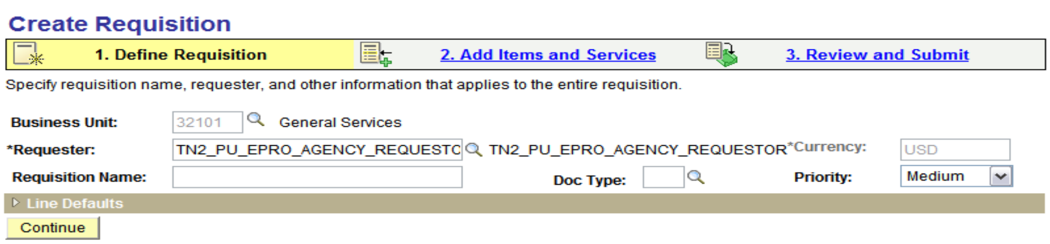
CENTRAL PROCUREMENT OFFICE
312 ROSA L. PARKS AVENUE, 3RD FLOOR • NASHVILLE, TENNESSEE 37243
(615) 741-1035 • FAX: (615) 741-0684 • WWW.TN.GOV/GENERALSERV/

2) The next step is to navigate to the **Create Requisition** page. Click on **eProcurement** from the left-hand menu. Then click **Create Requisition**, as shown in the picture below this paragraph, on the left. This can also be accessed by using the eProcurement link in the Main Menu at the center of the page. A picture of this is on the right.





3) Clicking on Create Requisition will bring up a new page, with a title saying **Create Requisition** in blue at the top. This is the main page for creating a Requisition, and has links that will go to the various sections that need to be completed. The sections are grouped under three main tabs, numbered in a strip at the top, below the title. The tab that is currently shown will be highlighted in yellow. See the picture below for an example. **Note**: In training, Buyer Defaults will not be set up, so you will have to enter the Business Unit.

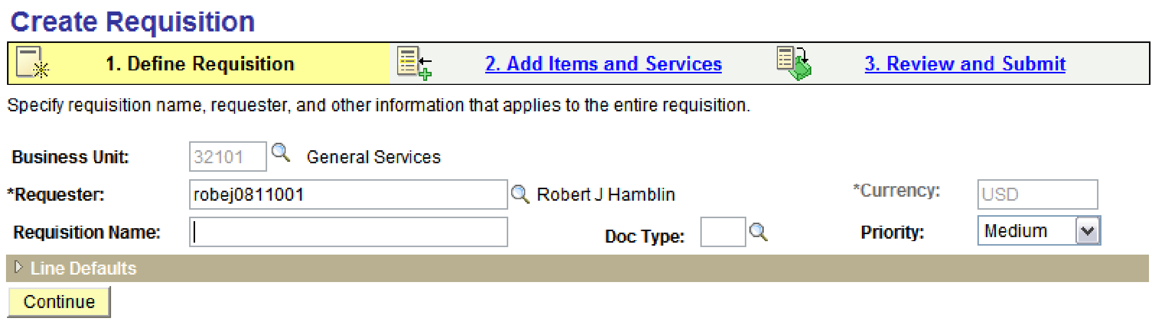


4) To create a Requisition, the Requester must first define the Requisition. The Define Requisitions tab should be highlighted in yellow. If not, click on Define Requisitions. Make sure that your Business Unit and Requester defaulted in correctly. Now you must assign a Requisition Name.

a. **Requisition Name** Click in the **Requisition Name** field and then type in the name. Name the Requisition after the items being requested. Note: requests that are routed to the CPO require additional information.

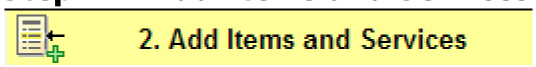
i. <u>**For requests that will be completed by Agency Buyers, simply name the Items being requested**</u>**.** This includes purchases from 5,000-25,000 and Contract Release orders.

ii. <u>**For requests that will be completed by the CPO, the Requisition Name must start with “DGS”**</u>**.** This includes Requests for Agency Contracts and One-time Purchases over $25,000. This is an identifier for the CPO. Example: “DGS Tiller, Rotary”.



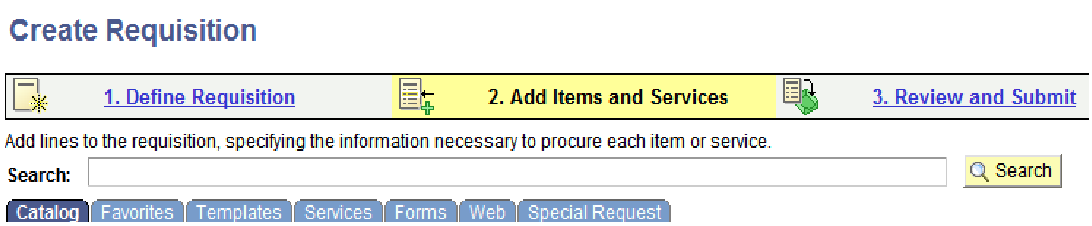
5) After naming your Requisition, click the Continue Button (Continue) located at the bottom to move to the next step in the Requisition Process.

Step 2: Add Items and Services



1) The next step is to add items to the requisition. Items can be pulled from the catalog, loaded from a saved Template created from a previous Requisition, or entered manually. **Agencies are required to first make sure the items are not available from an active contract**.

2) The main **Add Items and Services** page has 7 tabs at the top. Each of these tabs contains a different way to create Item Lines on a Requisition. The purchase type and Doc Type you've chosen determine the Item Selection tabs you will use to create your Requisition. A picture of the main Add Items and Services page is shown below.



3) From left to right, the tabs are as follows:

- **Catalog-** This allows you to search the Catalog for the items listed in the Item Master. The Catalog tab will mainly be used in setting up Contract Release orders. **Every item *that can have a fixed price* and is on a currentlyactive Statewide or Agency Term contract will be in the Item Master.** This means that Contracts for **hourly services**, **APCAT items** and **variable cost items ("parts plus")** will *not* be usable from the catalog. Every item in the Item Master is not necessarily on a contract. Commonly-ordered items will not be on contract, but may be in the Item Master.

- **Favorites-** The Favorites tab consists of Item Lines you have saved to your personal Favorites list. The method to do this will be detailed later in the document. This will have no information in it at Go-Live. This is a method to save Line Items you order frequently and reuse them in new Requisitions without having to enter them again. This tab is convenient, but is never required in any type of purchase.

- **Templates-** The Templates tab, like the Favorites tab, will have no information in it at Go-Live. It allows you to save sets of line items for future use. An example would be a "New Employee set" consisting of pens, a stapler and sticky notes. Three line items that can be saved as one Template, to be used any time the specific item listings need to be re-ordered. Like Favorites, this tab will never be required, but can be useful.

- **Services-** The Services tab will not be used at the current time.

- **Forms-** The Forms tab will not be used at the current time.

- **Web-** The Web tab is used to link to the websites of specially-selected Direct-Connect vendors. Direct-Connect vendors are contract-holding vendors that have set up a special version of their website for use by the State of Tennessee. The links here will take you to external websites to browse for items, and will pull the items back into your Edison requisition after you are finished shopping. Items on the web tab will be on Contract.

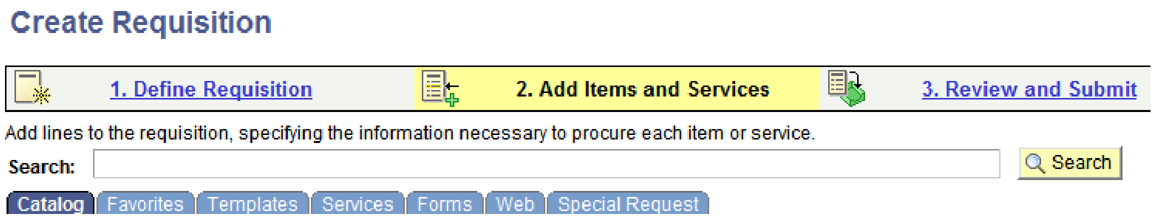
- **Special Request-** The Special Request tab can be thought of as a kind of "catch-all" tab. It allows you to type descriptions for items that are not in the Item Master. This will be used in requests for new Agency contracts and any requests for items over $5,000.01 that are not on contract. This tab can also be used to order contract items that are selected on the "As Per Catalog" (APCAT) principle. The Special Request tab **must** be used when buying anything on contract that does not have a fixed price, such as hourly rates and "parts plus" item lines on contracts.

4) The tab you use will be determined by the type of purchase Request you are creating. We will start with using the Catalog tab to do a Contract Release Order, and then list the other tabs in order.

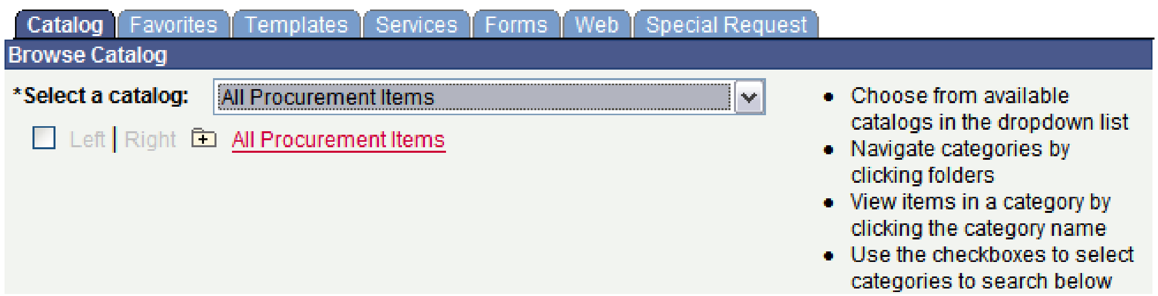
Catalog Tab and Contract Release Orders

To search for items:

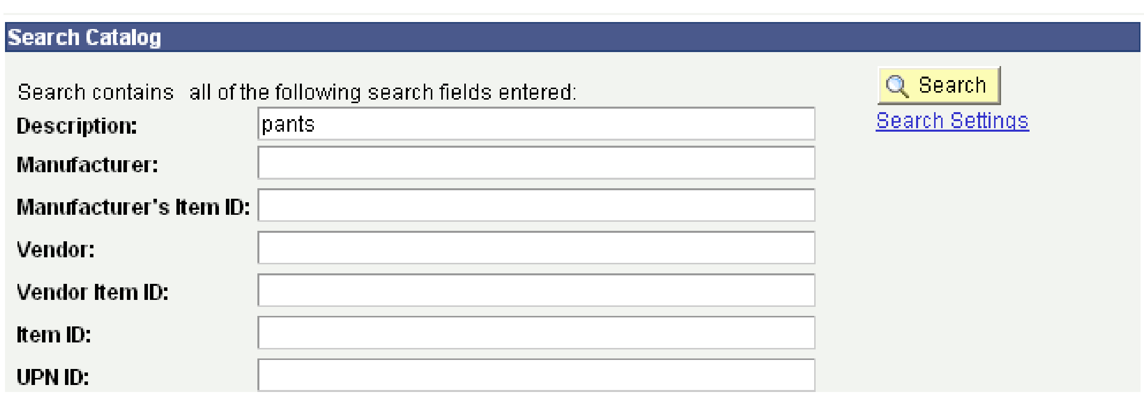
- First, click on the Catalog tab under the Search bar. In the example below, the catalog tab is highlighted.

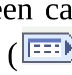


- Next, make sure the **All Procurement Items** catalog is selected from the drop-down menu, as shown on the next page. This should show as the default option when the Catalog tab is selected.



- Underneath the catalog listing is the **Search Catalog** section. This contains fields to search by different listings. For example, a description of the item can be typed in the Description field, such as “pants” to search for all items with “pants” in the description. After typing the Search Term in the Search field, press the Search button. An example is shown below.



- If any items meet the search criteria used, they will be displayed below the **Search Catalog** section. The results appear in a table format, with named headers at the tops of the columns. There are more column headers than the screen can display, so you can scroll to the right or press the Show All Columns () button to view the rest of the headers.

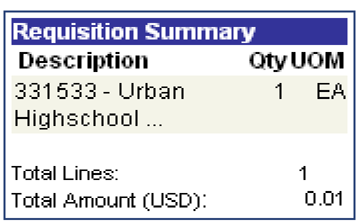
- Special Notes: The Vendor column lists the last vendor the item has been bought from. If there is a contract for that item, the number will appear in the Contract ID field. The Price field will show the fixed contract price if there is a contract. If there is no contract, it will default at the item's last purchase price.

Details

	Quantity		Item ID	Item Description	Item Detail	Price	Order UOM	Min Order QTY	Contract ID	Vendor
☐	1.0000	Add	1000049386	331533 - Urban Highschool Conference Participants Guide		0.010				
☐	1.0000	Add	1000050649	343695 - Training Participants Manual-Healthy Families America		0.010				
☐	1.0000	Add	1000050852	344002 - Sensitivity / Ethics Training - Participants Guide		0.010				

- If the item you need was located by the search (meaning it is on an active contract), check the box next to the item to include the item on the Requisition. Then type the Quantity in the Quantity field. An example is shown below with a Quantity of 1.0000.

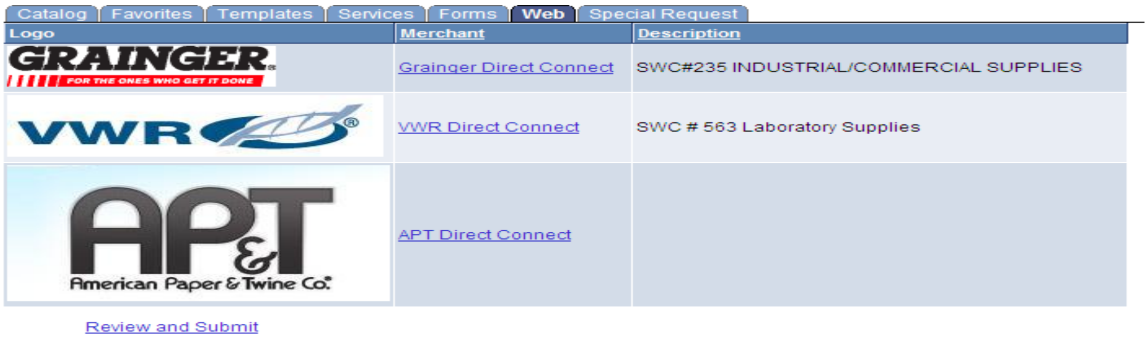
- After inputting the desired quantity, click the Add () button. Once added, the item and quantity will appear in the Requisition Summary box on the left side of the page, as shown below.



5) After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.

Web Tab and Contract Release Orders

1) If the item is not found in the Catalog tab, click the Web tab to search the Direct-Connect contracts. Within the web tab, there will be links to contract Vendor (Grainger, VWR Scientific, and AP&T) websites that have been customized for the State. An example is shown below. Scroll to the far right and click the links.



Directions are specific to each company's website. After finding the item, it will be added to the requisition. From there, the process is the same as a Contract Release done from the Catalog tab.

2) After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.

Special Request Tab and APCAT Contract Release Orders

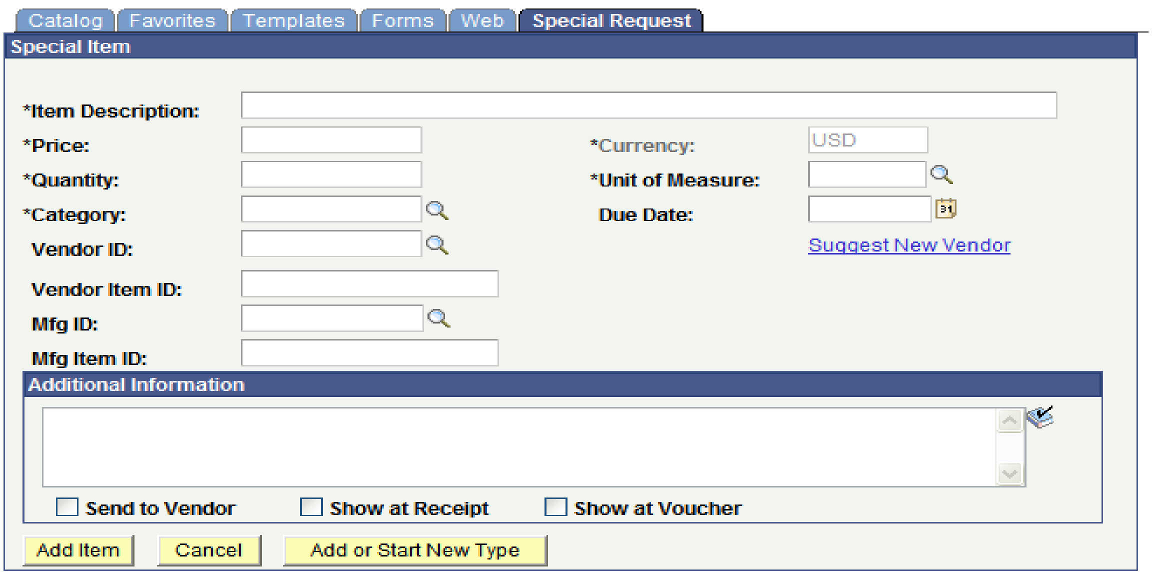
(Also used for "Parts Plus", "Time and Labor" and "Variable Cost")

1) APCAT Contracts: If you are ordering from a contract that lists a line as "As Per Catalog" (APCAT), you will need to obtain all the needed item information from the vendor or vendor catalog, similar to the current process in TOPS. Examples of

2) needed information are Vendor Item Number, Item Description, Unit of Measure and Unit Price (Catalog price less contract discount). Once this information is obtained, the item will be entered as a Special Request.

3) Note for APCAT Contracts: The Content Team will be reviewing items ordered, looking for commonly ordered items off of APCAT lines. Any item that is ordered often enough will be added as an item line, and will be in the catalog, like a normal Contract Release. Contact content.management@state.tn.us if you have any further questions about this process.

4) To enter a Special Request for APCAT, click the "Special Request" tab, highlighted in the example below. Then click the **Special Item (** Special Item **)** link.



5) The Special Request tab has several fields where information must be entered. The bulleted listed below lists these fields.

All the fields marked with an asterisk (*) must be completed.

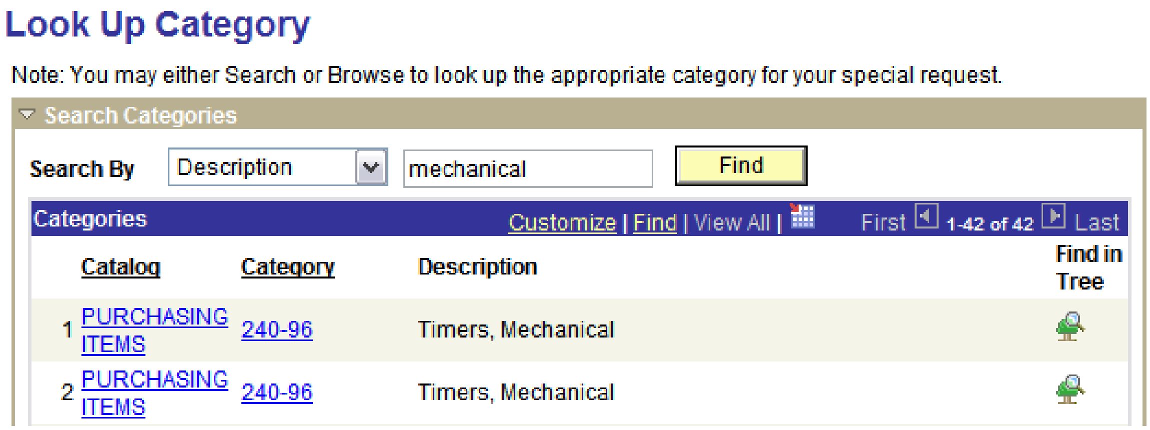
a) **Item Description**: This is used to enter a detailed description of the item. Good descriptions begin with a noun and then have descriptive terms. Such as "Pants, insulated, blue, 34 waist, 32 length"**.**

b) **Price**: This is the estimated price for the item.

c) **Quantity**: This is the quantity needed.

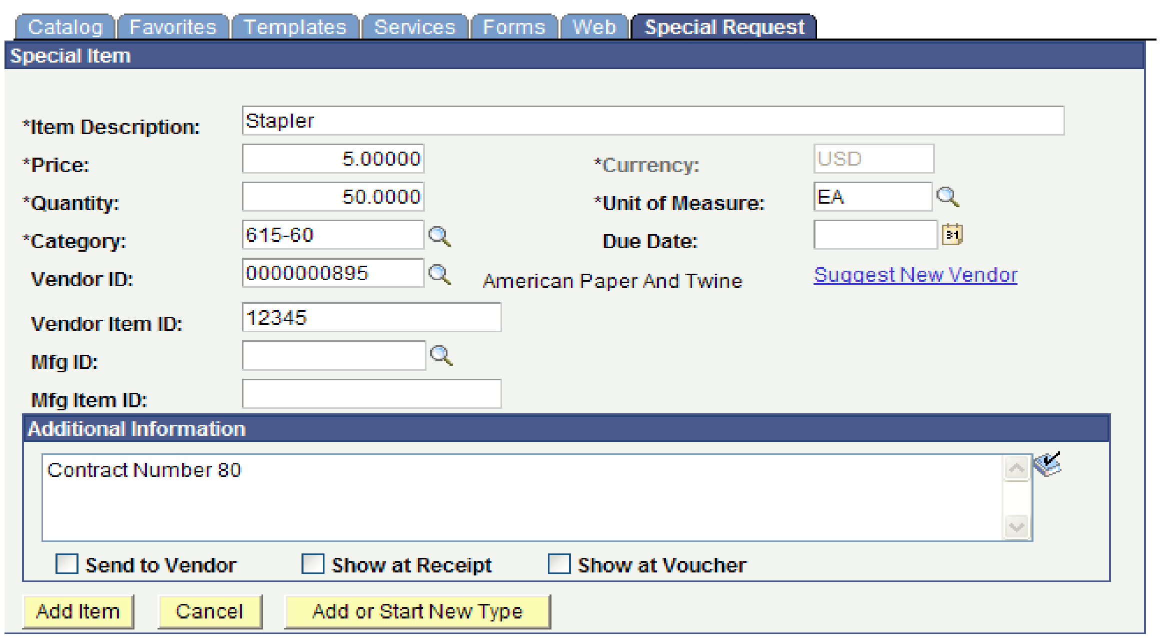
d) **Unit of Measure**: This is used to select a Unit of Measure. Press the Lookup Button ( ) to pull up a list of valid Unit of Measures. Select the appropriate Unit of Measure from the list.

e) **Category**: This is the National Institute of Government Purchasing (NIGP) code category. NIGP codes are the standard being used for Edison, replacing the old Tennessee Commodity Code (TCC) system. Press the Lookup Button ( ) to pull up the NIGP search screen, shown below.

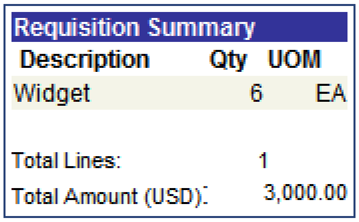


f) Type a description in the Description field and press the Find button. This will display a list of valid NIGP codes. Select the appropriate code from the list by clicking the link in the Category column. This will return you to the Special Item screen.

g) For APCAT Contract releases, there are three additional things that you must enter. These are the Vendor ID, Vendor Item ID and, if available, the contract number. See the picture on the next page for examples on where to enter this information. The Vendor ID can be found through searching the Catalog tab, while the Vendor Item ID will be obtained from contacting the Vendor directly.



h) After entering in all the required fields (listed above), press the Add Item button (Add Item).When added, the item and quantity will appear in the Requisition Summary box on the left side of the page, as shown on the next page.



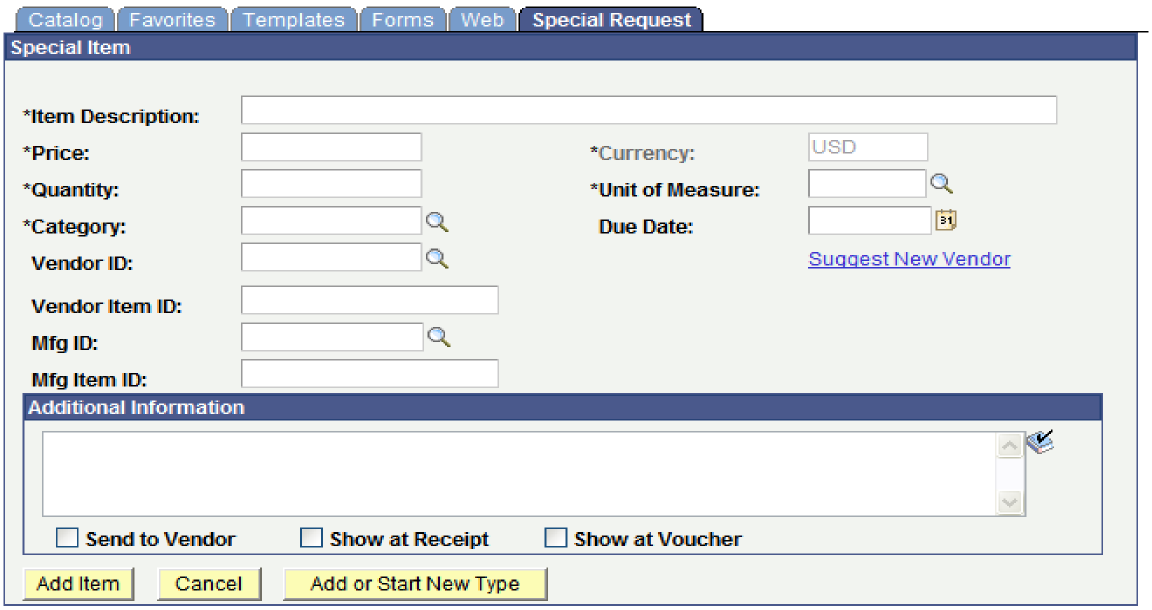
6) After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.

Special Request Tab for Requesting New Contracts

(Requests to create ATCs/ATMs)

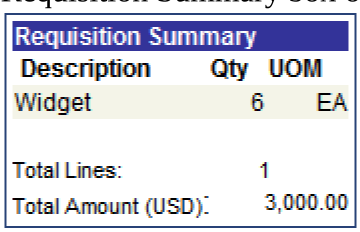
1) Special Requests for requesting a new Agency Contract are done the same way as requests for APCAT items, with two important differences.

- The Vendor ID, Vendor Item ID and Contract ID are not required.
- When requesting a contract, you must note in the Additional Comments field or the Description that you are requesting a contract. **Requests for new Agency Term Contracts must** have their Requisition Items assigned an Edison Item ID by the Content Group before the contract can be created. Please send an e-mail to Content.group@state.tn.us for further information.



2) The Special Request tab has several fields where information must be entered. The bulleted listed below lists these fields. As in an APCAT order, **All the fields marked with an asterisk (*) must be completed.**

a) After entering in all the required fields (fields with an asterisk), press the Add Item button (Add Item).When added, the item and quantity will appear in the Requisition Summary box on the left side of the page, as shown below.



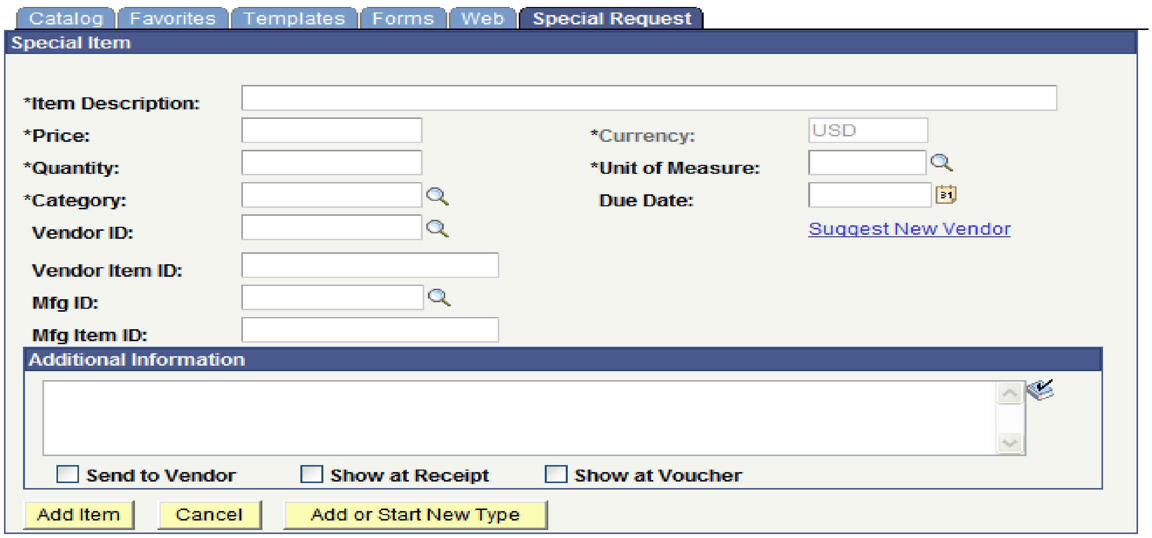
3) After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.

Special Request Tab for Local Purchases
(Non-Contract Items under $5,000 and from $5,000.01-$25,000)

1) Requests for all items not on contract and under $25,000 are done under "Local Purchase Authority". Local Requests from $5,000.01-$25,000 are done as Special Requests, which then are bid out by Agency Buyers, the bids recorded in Sourcing and the Award made.

2) Local Purchases under $5000 in Edison can be done as Special Requests as well. The only difference between this type of Local Purchase and the $5,000-$25,000 range is that Local Purchases from $5,000-$25,000 require Bids, while Purchases under $5,000 do not.

3) Both are done as Special Requests through eProcurement. This ensures that all the proper Approvals are attached. To enter a Special Request for Local Purchase in either dollar amount category, click the "Special Request" tab, highlighted in the example below. Then click the **Special Item (** Special Item **)** link.



4) The Special Request tab has several fields where information must be entered. The bulleted listed below lists these fields.

All the fields marked with an asterisk (*) must be completed.

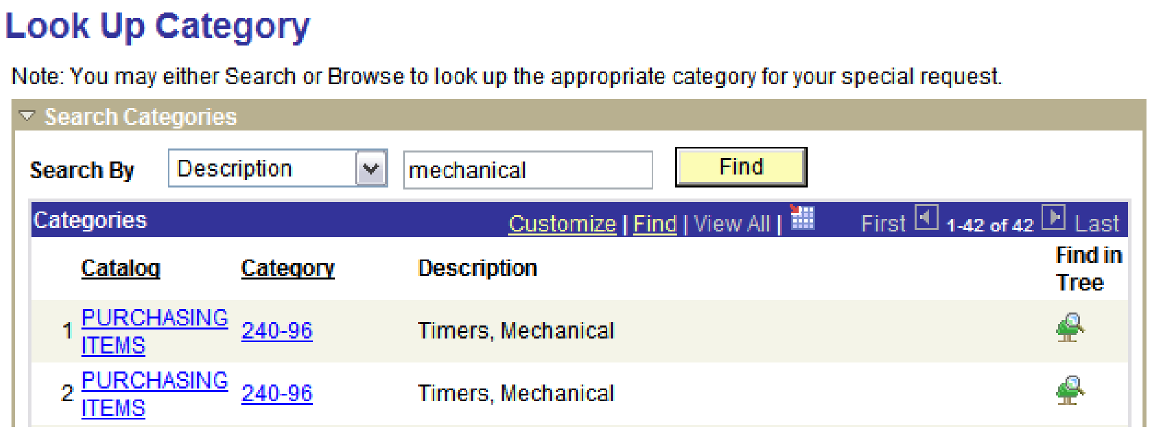
a) **Item Description**: This is used to enter a detailed description of the item. Good descriptions begin with a noun and then have descriptive terms. Such as "Pants, insulated, blue, 34 waist, 32 length"**.**

b) **Price**: This is the estimated price for the item.

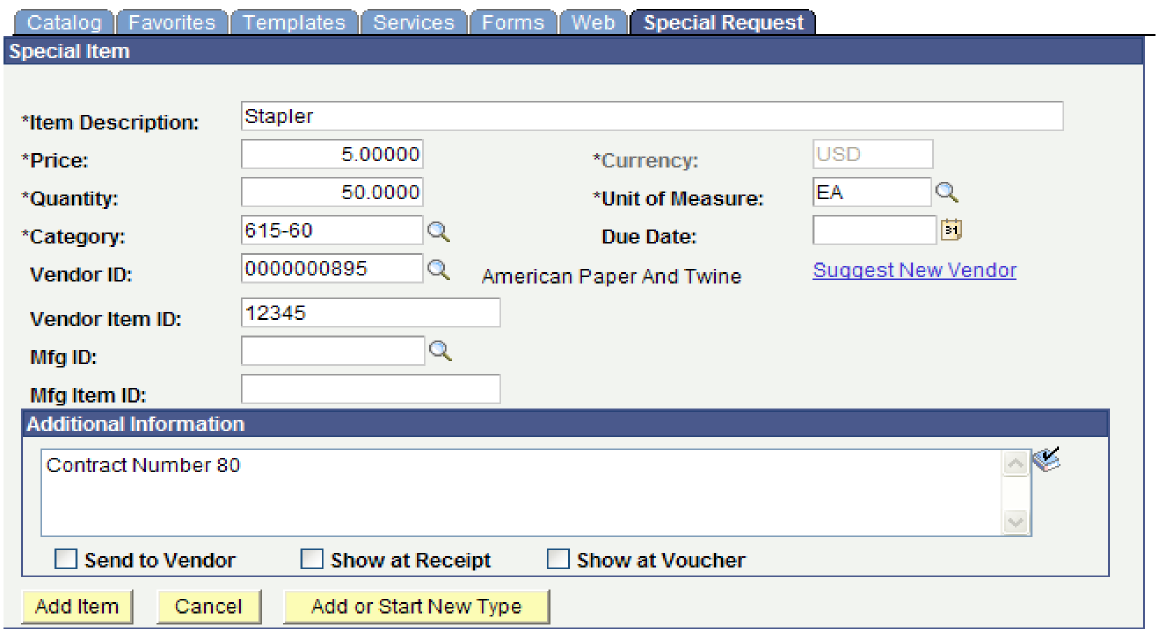
c) **Quantity**: This is the quantity needed.

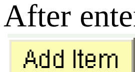
d) **Unit of Measure**: This is used to select a Unit of Measure. Press the Lookup Button ( ) to pull up a list of valid Unit of Measures. Select the appropriate Unit of Measure from the list.

e) **Category**: This is the National Institute of Government Purchasing (NIGP) code category. NIGP codes are the standard being used for Edison, replacing the old Tennessee Commodity Code (TCC) system. Press the Lookup Button ( ) to pull up the NIGP search screen, shown below.

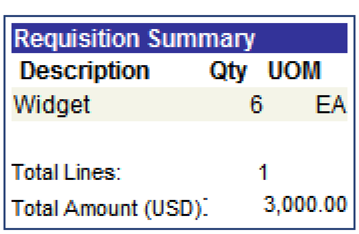


f) Type a description in the Description field and press the Find button. This will display a list of valid NIGP codes. Select the appropriate code from the list by clicking the link in the Category column. This will return you to the Special Item screen. The Category MUST be NUMERIC.



g) After entering in all the required fields (listed above), press the Add Item button (

).When added, the item and quantity will appear in the Requisition Summary box on the left side of the page, as shown on the next page.



After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right.

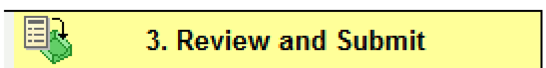
Reprocuring of Expired Agency Contracts

1) If the request is a Reprocurement of a previously active contract that has expired, you can copy over the old Requisition used to request the contract, or copy the items from the old contract using the Catalog tab. Instructions for searching for items in the Catalog are located in the Contract Release section.

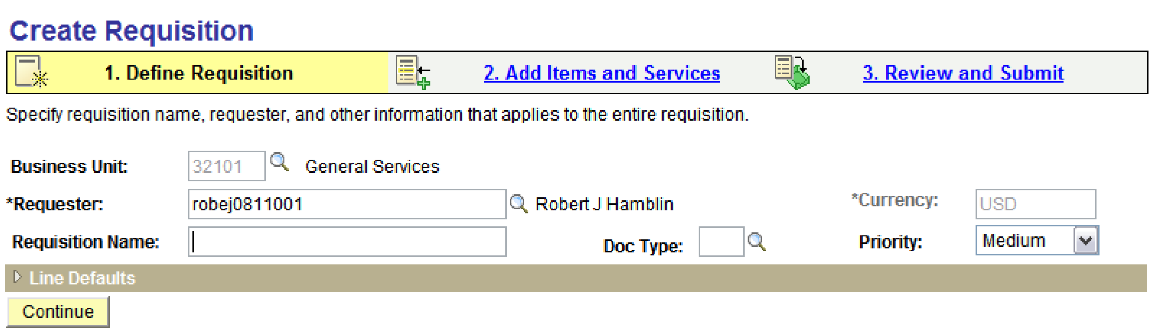
2) This means that the first time any Contract Request is entered, it must be done manually. After that, the items can be saved as a Template and reused when the contract must be reprocured again. Instructions for saving as a Template are located later in the document.

3) After the lines needed on the contract are copied over, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.

Step 3: Review and Submit



1) **Reviewing and Submitting Requisitions:** The final step in the Requisition process is to review and submit for approval. Regardless of the method and Purchase Type, all Requisitions will end here. The **Review and Submit** page contains a summary of the Requisition information. The first thing you must do on this page is enter your Document Type.



Document Type

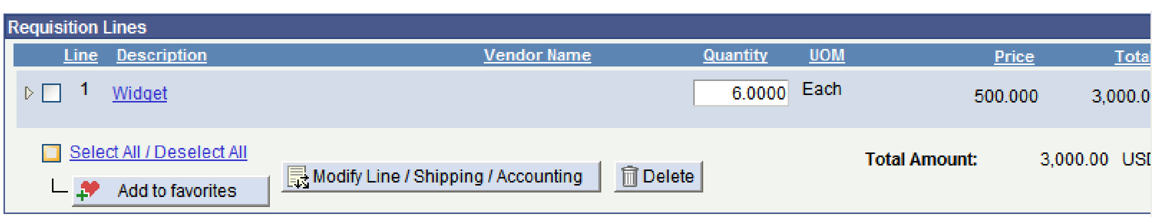
To select a Doc Type, click the Lookup Icon located by the Doc Type drop-down field. Choose the appropriate doc type from the list. **It is very important to use the correct Doc Type for the Requisition.** Incorrect Doc Types will greatly delay processing. The table below lists the Document Types that correspond to the types of Purchases. For example, if you are ordering items that are not on contract and the total is under $25,000, you would select the LPA Document Type.

The two most commonly used Doc Types in Agency Purchasing will be **DCR**, for Contract Release Orders and **LPA,** for Local Purchases with Agency Authority. **DCR** is for all Contract Release Orders. **LPA** is for *all* agency purchases that are *not on contract* and *do not come to the CPO*.

LPA	Local Purchase Authority – One-time purchases from $0 - $25000.00
DCR	DGS, Contract Release Order – Purchases made from an existing Statewide Contract or Agency Term Contract
DOT	DGS-One-time Purchase – One-time purchases over $25000.01
DCO	Agency Term Contract – 1 year agency term contract.
DCM	Agency Term Multi-year – 2-5 year agency term contract.

DCM	DGS, Agcy Contract Request, MY
DCO	DGS, Agcy Contract Request, 1Y
DCR	DGS, Contract Release Order
DDA	DGS, Delegated Purchase Auth
DOT	DGS, One-Time Purchase
DPO	DGS, Emergency PO Request
ITP	IT Pro
LPA	Local Purchase Authority
SDA	SVC - DA-type Delegated Athrty
SDG	SVC - DG-type Delegated Athrty
SDL	SVC - DL-type Delegated Athrty
SDP	SVC - DP-type Delegated Athrty

2) After checking all the information in the top portion of the screen, ensure that the Lines entered are correct. To view the entire line table, scroll to the right using the scrollbar at the bottom of the screen. The Requisition Lines will look like the picture below.



Altering Quantity:

The Line, Description, Vendor Name, Quantity, UOM, Price and Total are all pulled over from Step 2. If changes need to be made to the Quantity, click on the Quantity field and type in the new amount.

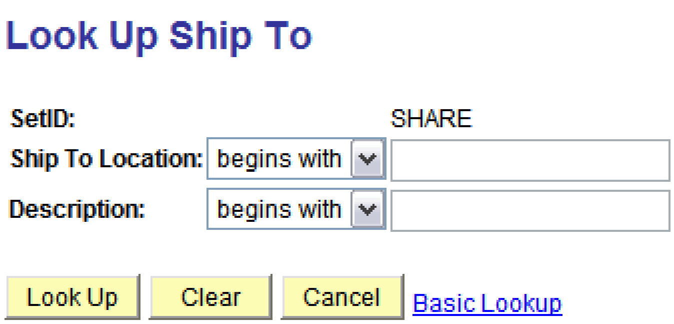
Deleting Lines:

If a line needs to be deleted, click the check box next to the line, then press the Delete button (Delete). This will delete the line. If you only have one line, you cannot delete it. **Once a line is deleted it cannot be recovered. You must re-enter the line from step 2, (Enter Line Items) if you delete it.**

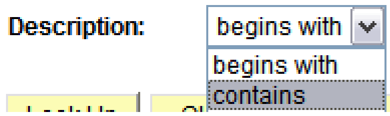
Shipping Addresses:

To modify a Shipping Address, you must expand the table by using the Expand Section ( ) button. This will show the *Ship-To field PMFMSHIPTO . It defaults as PMFMSHIPTO, which must be changed.

- Click the Lookup Icon ( ) next to the Ship-To field. This brings you to the Look up Ship to page, as shown below.

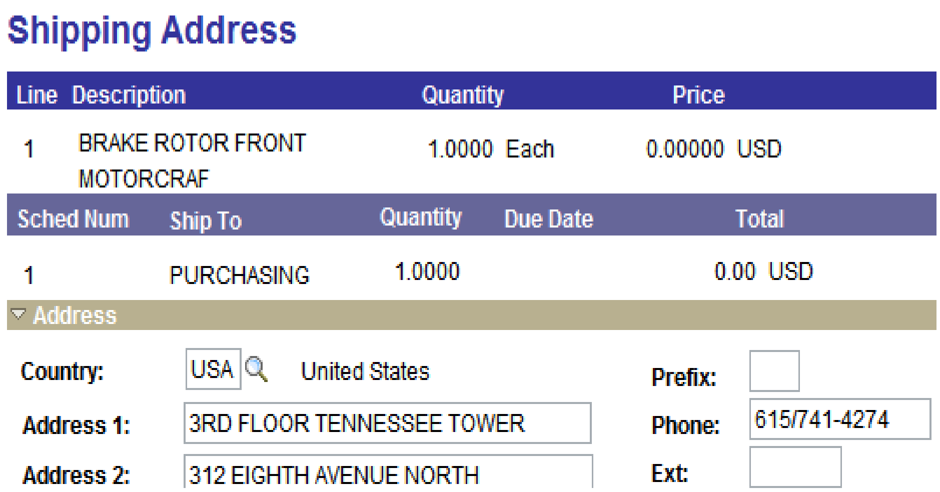


- Use the Look up Ship to screen to find your specific Ship To location by changing the drop-down box next to the "Description" field from "begins with" to "contains". Then press the Look Up button.



- This will pull up a list of agency locations.

- Click the location that seems correct to go back to the main page. Use the Modify Shipping Address (Modify Shipping Address) link, located to the right of the Ship-To field to check the pulled address.
- This brings up the address information tied to that Ship-To location.



- Verify that the information is correct. If it is not, choose a different Ship-To location.

Adding Notes and Comments:

Any special delivery instructions for the item have to be provided. To Add Notes or Comments, click the Comments button ( ) at the far right of the screen. If it is not visible, use the scrollbar at the bottom to scroll to the right. This will open up a new window. Type any general descriptive information into the text box (such as "Call for delivery").

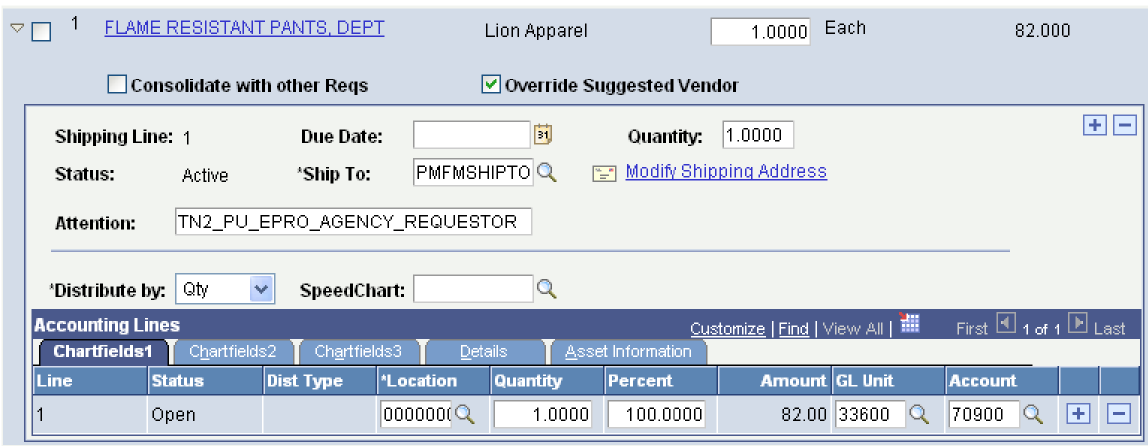
❖ **Repeat as necessary for all lines**

Chartfields:

Chartfields contain the accounting information. It is the responsibility of the agency to ensure the information in the Chartfield is correct. To view Chartfield information, you must expand the table by using the Expand Section ( ) button. Each of the fields listed below must have information populated in them.

- Location: Found on the Chartfields1 tab.
- GL Unit: Found on the Chartfields1 tab.
- Account: Found on the Chartfields1 tab.
- Fund: Found on the Chartfields2 tab.
- Department: Found on the Chartfields2 tab.
- Location CF: Found on the Chartfields2 tab.

Information on each of those fields can be found by using the Lookup button located next to each field. The particular listing (for example, what Fund to use) can be obtained from the specific Agency's Fiscal Office.



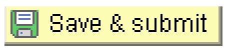
Justifications:

Justifications will be typed in the Justification/Comments section as required by CPO policies and procedures. This field is for internal use only. Do **NOT** check the Send to Vendor, Show at Receipt or Show at Voucher checkboxes.

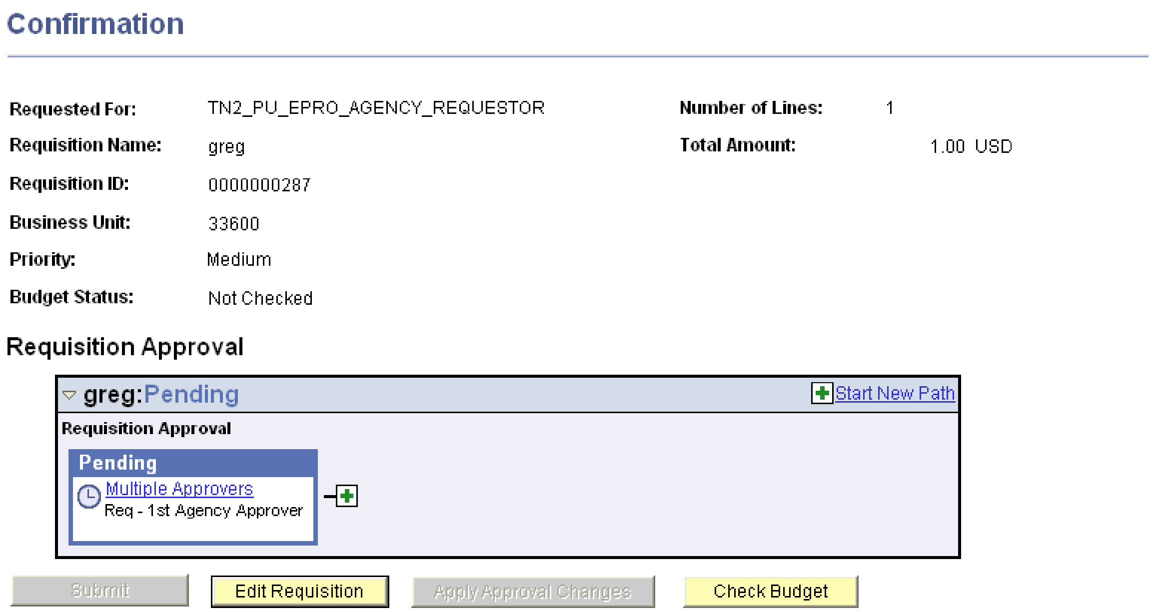
3) The requisition can be saved as a Template by checking the "Save as Template" box. Templates can be selected in Step 2 to automatically fill in the item Lines when creating new Requisitions. It is a good idea to save all Contract Requests as a Template, in the event that they have to be reprocured in the future.

4) To Budget Check the Requisition, press the “Check Budget” button. This must be completed in order to pre-encumber funds.

5) To Save and Submit the Requisition for further processing, press the “Save and Submit” button.



6) Once the Requisition has been saved, it will go to a screen showing the approval path. It will have a **Requisition ID** number underneath the Requisition Name. This is used to search for the Requisition if needed later.



Confirmation

Requested For:	TN2_PU_EPRO_AGENCY_REQUESTOR	Number of Lines:	1
Requisition Name:	greg	Total Amount:	1.00 USD
Requisition ID:	0000000287		
Business Unit:	33600		
Priority:	Medium		
Budget Status:	Not Checked		

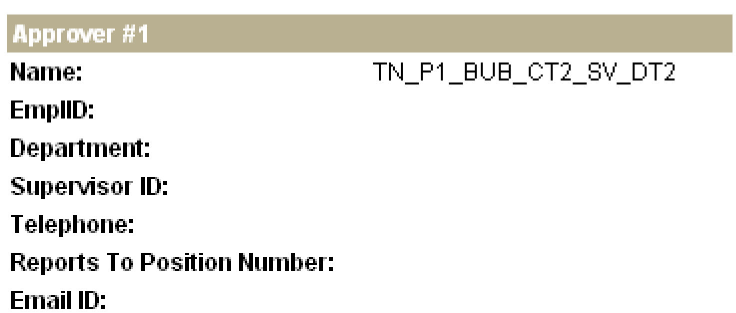
Requisition Approval

greg:Pending
Start New Path
Requisition Approval
Pending
Multiple Approvers
Req - 1st Agency Approver

Submit
Edit Requisition
Apply Approval Changes
Check Budget

Approvals

a) To view more information on the approvers, click on the “Multiple Approvers” (Multiple Approvers) link. This will bring up a window with a list of all the approvers currently assigned to the Requisition.



Approver #1	
Name:	TN_P1_BUB_CT2_SV_DT2
EmplID:	
Department:	
Supervisor ID:	
Telephone:	
Reports To Position Number:	
Email ID:	

b) To add additional approvers, click the Insert Approver button. ( ) This will bring up a new window. Select the User ID of the approver to be added by clicking the Lookup button ( ) next to the User ID field, then selecting the User ID from the list.

i. Use the Radio Buttons ( ) below the User ID Field to select if the person will be added as an Approver or Reviewer. Reviewers receive a notice through their Workflow to review the item, but are not required to approve. Approvers *must* approve to continue the process.

ii. After selecting the Approver's User ID and their function (Approver or Reviewer), click the Insert button. Insert This returns you to the main approval screen.

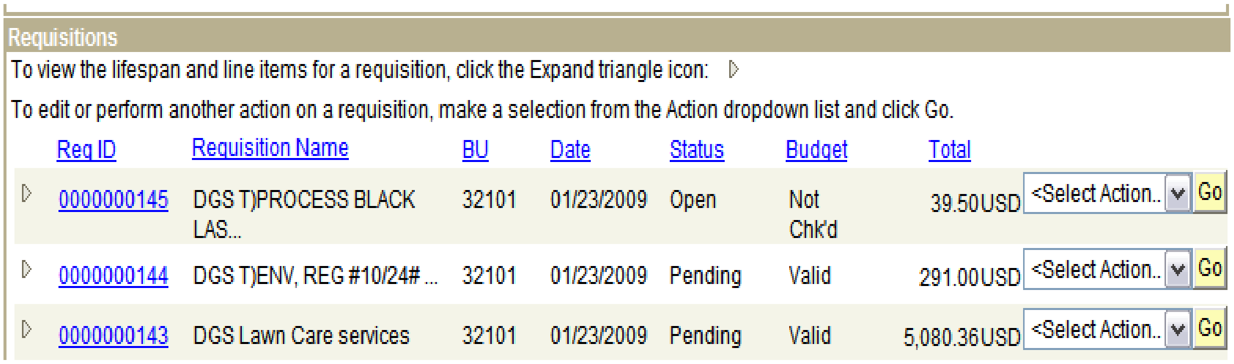
7) Requisitions must pass all approvals before being sent on to either the Agency Buyer or CPO personnel.

✸ **Note on Approvals:** The eProcurement Requisition process is being taught as the main method for all forms of Procurement because it automatically builds necessary approvals based on the item's NIGP code, the dollar amount of the purchase and the business unit. These approvals are set up in Workflow by Edison, and include all ***commodity approvals***.

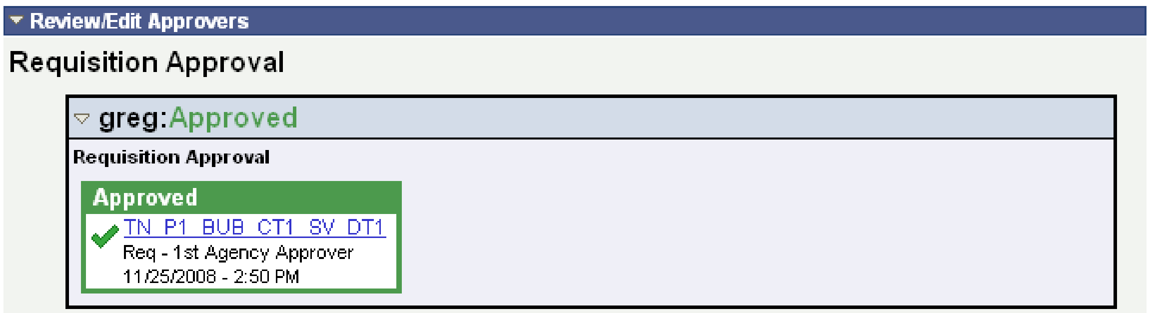
✸ Any problems with Workflow need to be called in as a ticket to the Edison Helpdesk (741-4357).

8) **To view the status of the Requisition**, go to the Manage Requisitions page. Click eProcurement, then Manage Requisitions.

Scroll down until the Requisition number is found, or use the Search function to search by the Requisition ID (**Requisition ID:**).
The Approval Status and Budget Check status of the Requisition are listed in this table.



9) Once the Approvals have been met, the Requisition Approval screen will change to show that the Requisition has been approved. See the picture below for an example.



When the Requisition is approved, you are ready to proceed. Depending on the Doc Type, the Requisition will go to one of three places.

- Local Purchases will go to Agency Buyers to be bid out and Sourced, which the next section covers.
- Contract Release Orders and orders under $25,000 will be turned into Purchase Orders, which the final section covers.

Non-Contract Purchases over $25,000 and Requests for Agency Contracts will appear on a daily report run by the CPO and will be assigned to appropriate personnel.